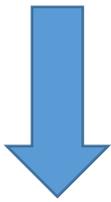


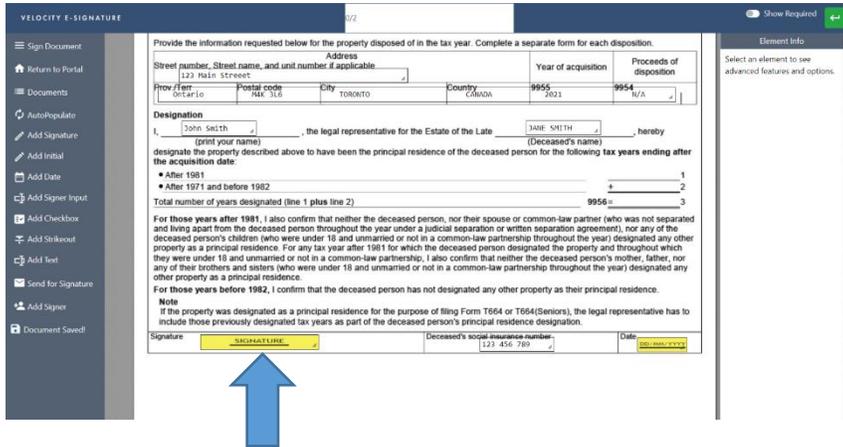
# Preparing a document for signature (edit session) overview.

## A step by step tutorial is also available – see Edit session tutorial

Edit functions that are possible when editing a session:



- a) Place a signature, initial or date location on the document.
- b) Insert a text or place a strikeout.
- c) Place a checkbox for a signer to check when signing,
- d) Place a signer input box for a signer to fill out a field when signing
- e) View the document list and switch between documents.

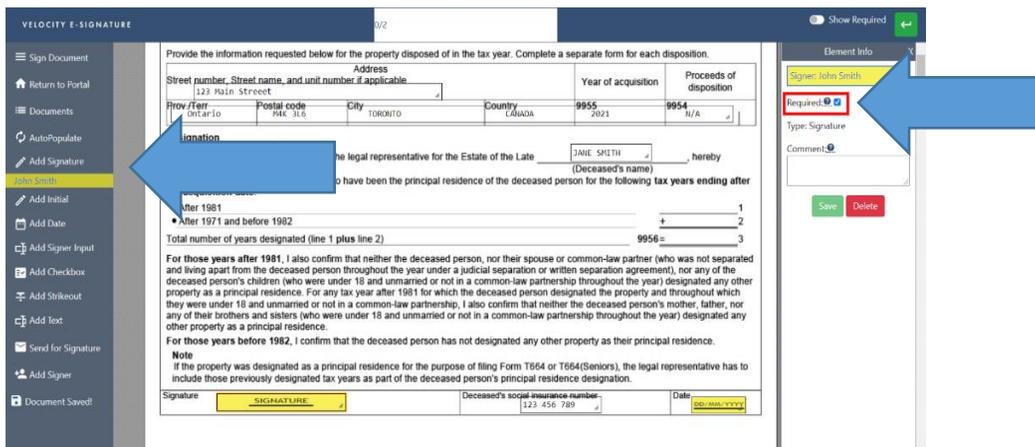


If your documents were recognised with the AutoRecognise™ feature they will be ready to send for signature. Review the document to ensure there are no other locations that may need to be signed and then select the mail icon at the top of the page and follow the prompts. (see #5 send for signature options for additional information).

### 1) Placing a signature, initial, date, textbox or signer input object

Select the required option on the left side and then select the name of the signer. The mouse will then hover with the selected option visible and you can click the left mouse button to place it on the page.

You can continue placing the same option for that signer until complete. Press the escape button at any point to cancel the selection. All signature, initial, date and signer input options are required by a signer to complete unless this is toggled off by the host.



## 2) Draw/Place a strikeout

- a. Select strikeout and press and hold the left mouse button to draw the line on the document.

In accordance with the terms and conditions of the Agreement of Purchase and Sale dated the \_\_\_\_\_ day of \_\_\_\_\_  
20\_\_\_\_\_, regarding the above property, I/We hereby waive the condition(s) which recite(s) as follows:

## 3) Delete, change location and resize any object

- a. To delete select the “x” in the top right corner of any object
- b. To resize press and hold right mouse button and drag to preferred size
- c. To relocate left click and hold the mouse button anywhere in the object and drag to desired location



## 4) Leave a comment

You can leave a comment for a signer to see when they are signing a specific signing location. This comment will appear once they select that location to sign, and they will be prompted to acknowledge the comment before signing. This acknowledgement will be recorded in the audit trail.

To leave a comment, select the signature or initial requiring comment. On the right side type your comment into the comment box and select save.

VELOCITY E-SIGNATURE

Q2

Show Required

Element Info X

Signer: John Smith

Required

Type: Signature

Comment

Save Delete

Type comment

Select object for comment

Provide the information requested below for the property disposed of in the tax year. Complete a separate form for each disposition.

Address				Year of acquisition	Proceeds of disposition
Street number, Street name, and unit number if applicable	Postal code	City	Country		
123 Main Street	M4K 3L6	TORONTO	CANADA	9955 2821	9954 N/A

Prov/ Terr: Ontario

Designation

I, John Smith, the legal representative for the Estate of the Late JANE SMITH, hereby designate the property described above to have been the principal residence of the deceased person for the following tax years ending after the acquisition date:

After 1981	After 1971 and before 1982	Total number of years designated (line 1 plus line 2)
1	2	9956 = 3

For those years after 1981, I also confirm that neither the deceased person, nor their spouse or common-law partner (who was not separated and living apart from the deceased person throughout the year under a judicial separation or written separation agreement), nor any of the deceased person's children (who were under 18 and unmarried or not in a common-law partnership throughout the year) designated any other property as a principal residence. For any tax year after 1981 for which the deceased person designated the property and throughout which they were under 18 and unmarried or not in a common-law partnership, I also confirm that neither the deceased person's mother, father, nor any of their brothers and sisters (who were under 18 and unmarried or not in a common-law partnership throughout the year) designated any other property as a principal residence.

For those years before 1982, I confirm that the deceased person has not designated any other property as their principal residence.

Note  
If the property was designated as a principal residence for the purpose of filing Form T664 or T664(Seniors), the legal representative has to include those previously designated tax years as part of the deceased person's principal residence designation.

Signature: SIGNATURE

## 5) Edit a textbox

After placing a textbox click inside the box to begin typing.

The screenshot shows the VELOCITY E-SIGNATURE interface. On the left sidebar, the 'Add Text' button is highlighted with a blue arrow. The main form is titled 'Provide the information requested below for the property disposed of in the tax year. Complete a separate form for each disposition.' It includes fields for Address (Street number, Street name, and unit number if applicable), Year of acquisition, and Proceeds of disposition. Below this is the 'Designation' section, which includes a text input field for the legal representative's name (John Smith) and a dropdown for the deceased's name (JANE SMITH). A blue arrow points to a 'Required' field in the form. The bottom of the form has fields for Signature, Deceased's social insurance number, and Date. On the right, there is an 'Element Info' panel showing the signer's name (John Smith) and a 'Required' field.

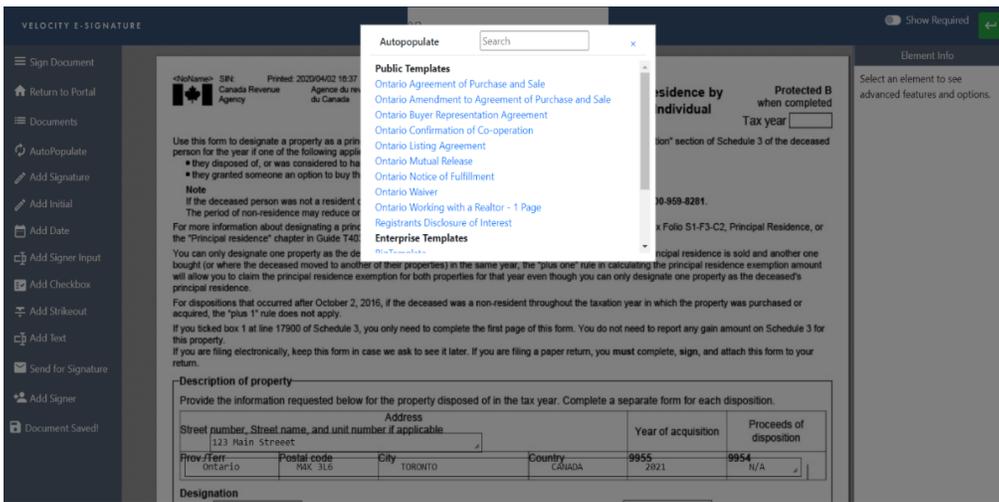
## 6) Switch between documents

Click the documents button on the left side to switch between documents.

The screenshot shows the VELOCITY E-SIGNATURE interface. On the left sidebar, the 'Documents' button is highlighted with a blue arrow. The main area displays a document list with a search bar and a document titled '2019 T1255 PRD - Deceased POA.pdf'. Below the document list, there is a preview of the document content, which includes instructions for designating a principal residence and a form for providing information requested below for the property disposed of in the tax year. The form includes fields for Address (Street number, Street name, and unit number if applicable), Year of acquisition, and Proceeds of disposition. Below this is the 'Designation' section, which includes a text input field for the legal representative's name (John Smith) and a dropdown for the deceased's name (JANE SMITH). The bottom of the form has fields for Signature, Deceased's social insurance number, and Date. On the right, there is an 'Element Info' panel showing the signer's name (John Smith) and a 'Required' field.

## 7) Autopopulate

If you would like a document to automatically populate signing locations from a template select Autopopulate and then choose the template from the list. The locations for all signers will be placed on the document for your review.



## 8) Sending for signature

All signers will receive a copy of the executed documents once all signers have completed their signing session. There are three options for sending for signature:

- i) **Send All** - send to all signers at once
- ii) **Individual Send** – select the blue send button to the right of the signer’s name – this will send to that specific signer only. You can manually select the other signers at any point. Once sent, the send icon will change to sent.
- iii) **Send in order** – choose an order that signers will automatically sign in. The system will send to the first signer immediately, notify you once they have completed signing and then send to the next signer in the list.

